

# Clinical Reporting for Supervision

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# Learning Objectives

1. Learn to retrieve individual and caseload reports.
2. Understand the types of reports available.
3. Interpret reports to answer four common staffing questions.
4. Interpret reports to answer six common clinical questions.

# Learning Objective #1

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# The Developer Program Icon



Clinical  
Reports

# Clinical Report Logon Screen



The screenshot shows a Windows-style dialog box titled "Logon". It contains three text input fields: "Username:" with the text "interesteduser99", "Password:" with masked text "xxxxxxx", and "Database:" with the text "dohrpt". At the bottom are two buttons: "Connect" and "Cancel". The "Connect" button is highlighted with a dashed border.

➤ Same As Discoverer

➤ Same As Discoverer

➤ Enter **dohrpt** only  
In lower case

# Logon Error Messages



Translation...

Your network connection is not active.



Translation...

You entered your username or password incorrectly.

Your username and password have not been approved for reporting



Translation...

You entered DOHRPT incorrectly.

Something is wrong with the DOHRPT server.

# A First Look at the Main Screen

Developer/2000 Forms Runtime for Windows 95 / NT

Action Edit Query Block Record Field Window Help

WINDOW1

### Download Case Load Data

☒ Registered Clients Only?

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CR No.:

---

☐ Download Detail Data?

Care Coordinator ID:

Record: 1/1

Exit

# The Wheat from the Chaff

Developer/2000 Forms Runtime for Windows 95 / NT

Action Edit Query Block Record Field Window Help

WINDOW1

**Download Case Load Data**

☒ Registered Clients Only?

CR No.:

Download Client Data

☐ Download Detail Data?

Care Coordinator ID:

Download All Clients

You can Ignore Everything Else Except this Box

Record: 1/1



# Main Screen Functions

If you check this box, you will only have access to clients currently registered in CAMHMIS.

Be careful of using this when downloading all clients for a Care Coordinator as you may be downloading MOUNTAINS of data!

The screenshot shows a window titled 'WINDOW1' with the title bar in blue. The main content area is light gray and titled 'Download Case Load Data'. It contains two sections separated by horizontal lines. The top section has a checked checkbox labeled 'Registered Clients Only?'. Below it is a label 'CR No.' followed by a text input field. A button labeled 'Download Client Data' is positioned below the input field. The bottom section has an unchecked checkbox labeled 'Download Detail Data?'. Below it is a label 'Care Coordinator ID:' followed by a text input field. A button labeled 'Download All Clients' is positioned below the input field. Annotations with arrows point to various elements: an arrow points from the top text block to the 'Registered Clients Only?' checkbox; an arrow points from the middle text block to the 'Download Client Data' button; an arrow points from the bottom text block to the 'Download Detail Data?' checkbox; an arrow points from the right text block to the 'CR No.' input field; another arrow points from the right text block to the 'Download Client Data' button; a third arrow points from the right text block to the 'Care Coordinator ID:' input field; and a fourth arrow points from the right text block to the 'Download All Clients' button.

To download all information for a single youth, enter the CR Number here, then click the Button.

On average, this will take 3-5 minutes.

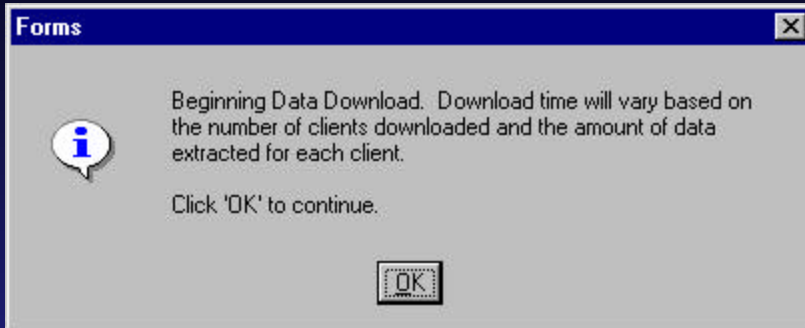
To download information for all clients registered to a single care coordinator, enter the CCID here, then click the Button.

On average, this will take 1-2 minutes per youth.

If you check this box, you will download all information for all clients in the caseload.  
This takes an extra 1-2 minutes per youth on average.

If you do not download the details, you will not receive service information.

# Individual Client Messages



Translation...

You entered the data correctly.

The information was found.  
Please wait, Excel will launch when ready.



Translation...

You entered a CR Number that could not be recognized.

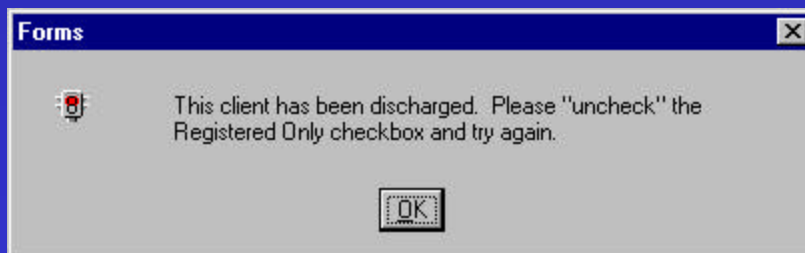
Please check the format of the CR number  
and re-enter.



Translation...

You entered a valid CR Number, but the client  
is not currently registered.

You can get the information by unchecking the  
registered clients only box.



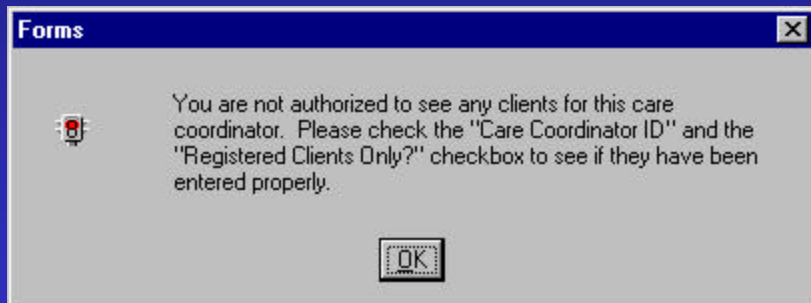
# Care Coordinator Messages



Translation...

You entered the data correctly.

The information was found.  
Please wait, Excel will launch when ready.



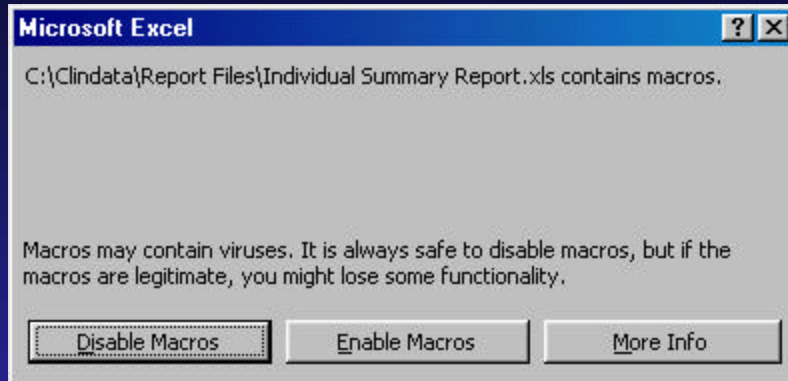
Translation...

You do not have permission to view this data.

No currently registered clients were found,  
you may look for unregistered clients.

You entered a care coordinator ID number that  
could not be found.

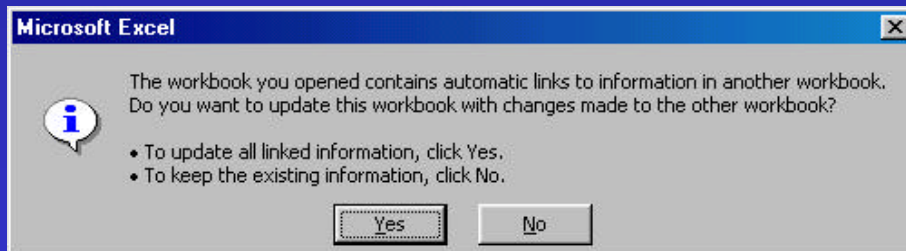
# Excel Messages



Translation...

The clinical report files contain small programs called Macros, but they are not viruses.

Click the Enable Macros button to activate all functions of the reports.



Translation...

The clinical report files read information from many other files.

Click the Yes button to be sure that your report includes the most up-to-date information.

# Excel Messages

Translation...

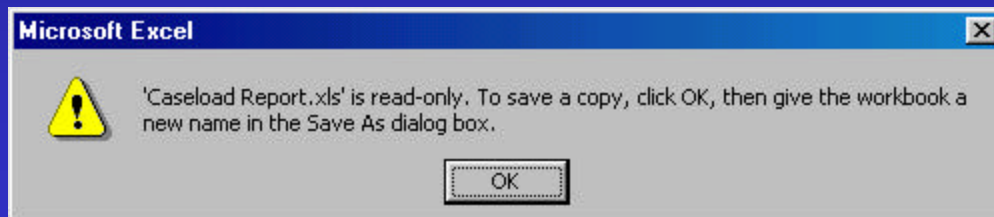
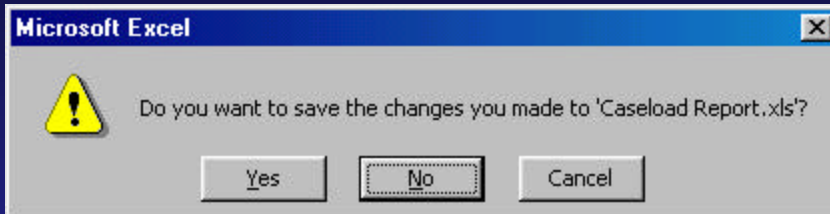
When you exit Excel, you may get this message asking whether you want to save the updated information.

Click **No**, because the reports are designed to be empty.

Translation...

If you try to save the updated information by clicking Yes in the previous box, you will receive this error.

Click **OK**, and then try to close the program again.



## Learning Objective #2

1. Learn to retrieve individual and caseload reports.
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# Individual Client Reports

WINDOW1

## Download Case Load Data

☒ Registered Clients Only?

---

CR No.:

---

☐ Download Detail Data?

Care Coordinator ID:

Achenbach Total Problems  
Achenbach Total Competence

CAFAS 8-Scale Total  
CAFAS Role Performance

CALOCUS Total  
CALOCUS Level

Diagnosis  
Interagency Involvement  
Service Authorizations

Achenbach Subscales  
CAFAS Subscales  
CALOCUS Subscales

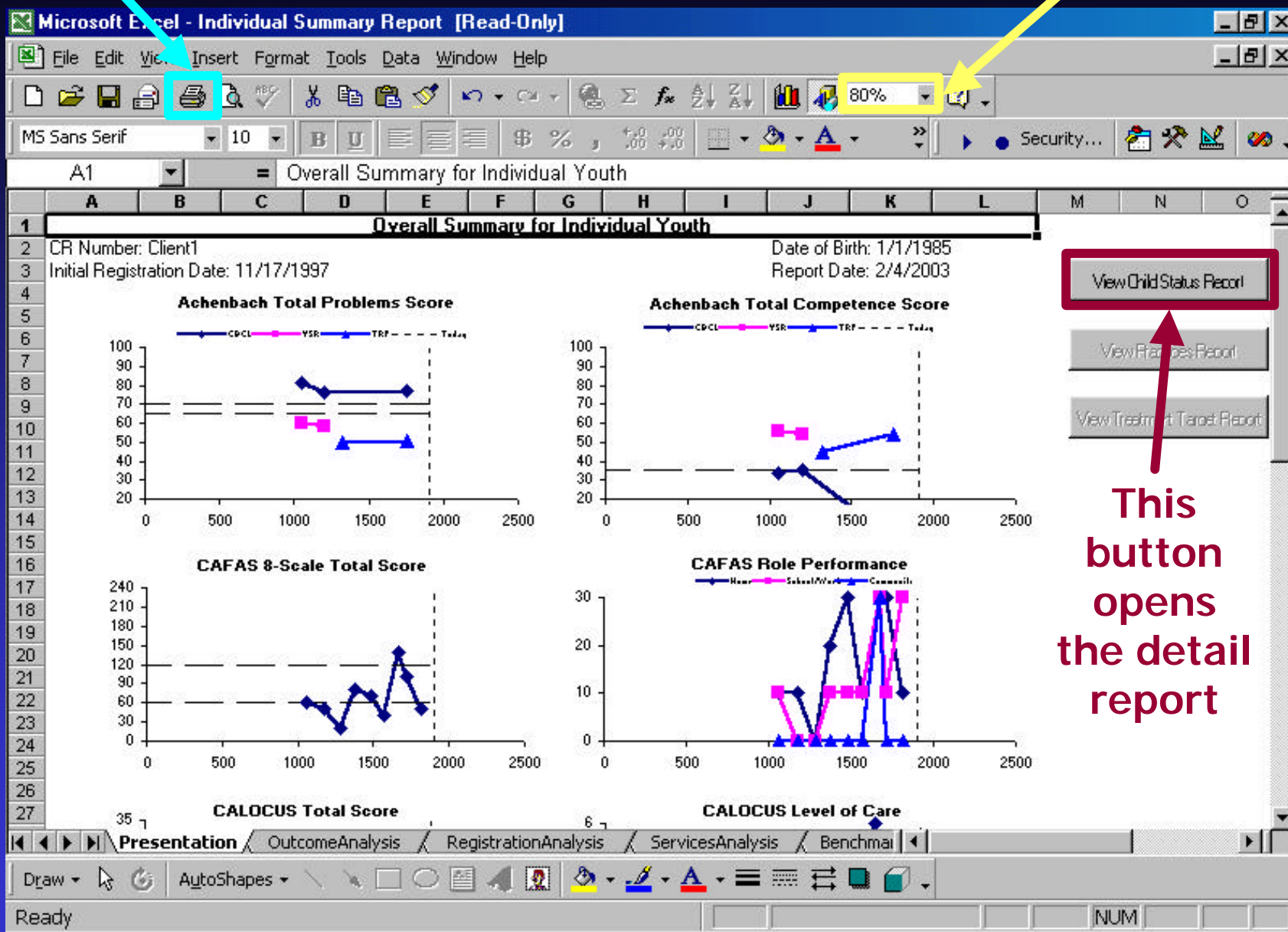
Individual  
Summary Report

Individual  
Detail Report

Print

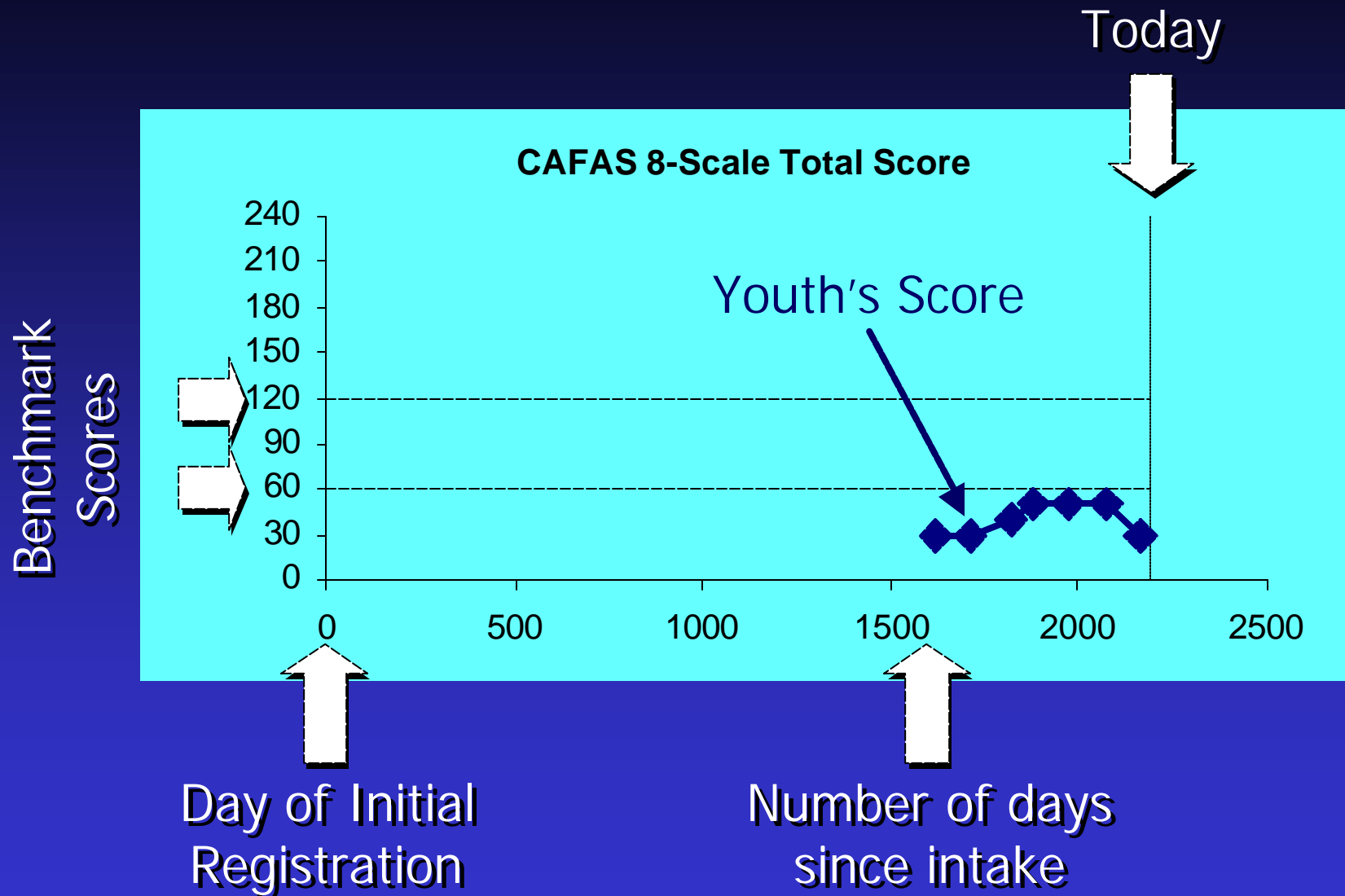
# Welcome to Excel

Zoom



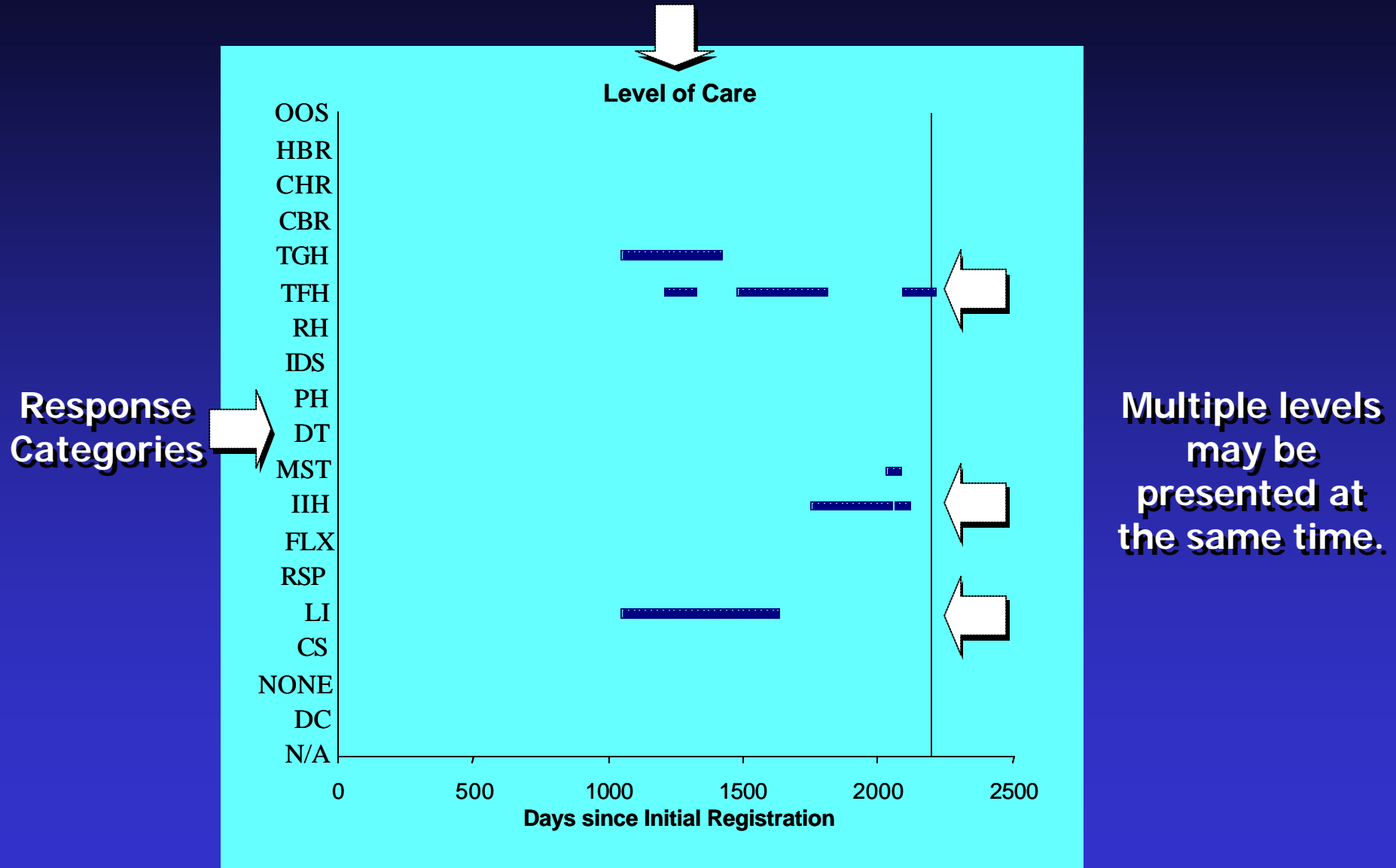


# Individual Client Graph Type 1



# Individual Client Graph Type 2

Response Dimension



# Caseload Reports

WINDOW1

## Download Case Load Data

☒ Registered Clients Only?

---

CR No.:

---

☐ Download Detail Data?

Care Coordinator ID:

Remember: No Details, No Historical Service Information

Achenbach Total Problems  
Achenbach Total Competence

CAFAS 8-Scale Total  
CAFAS Role Performance

CALOCUS Total  
CALOCUS Level

Diagnosis  
Interagency Involvement  
Service Authorizations

Achenbach Subscales  
CAFAS Subscales  
CALOCUS Subscales

Individual  
Summary Report

Individual  
Detail Report

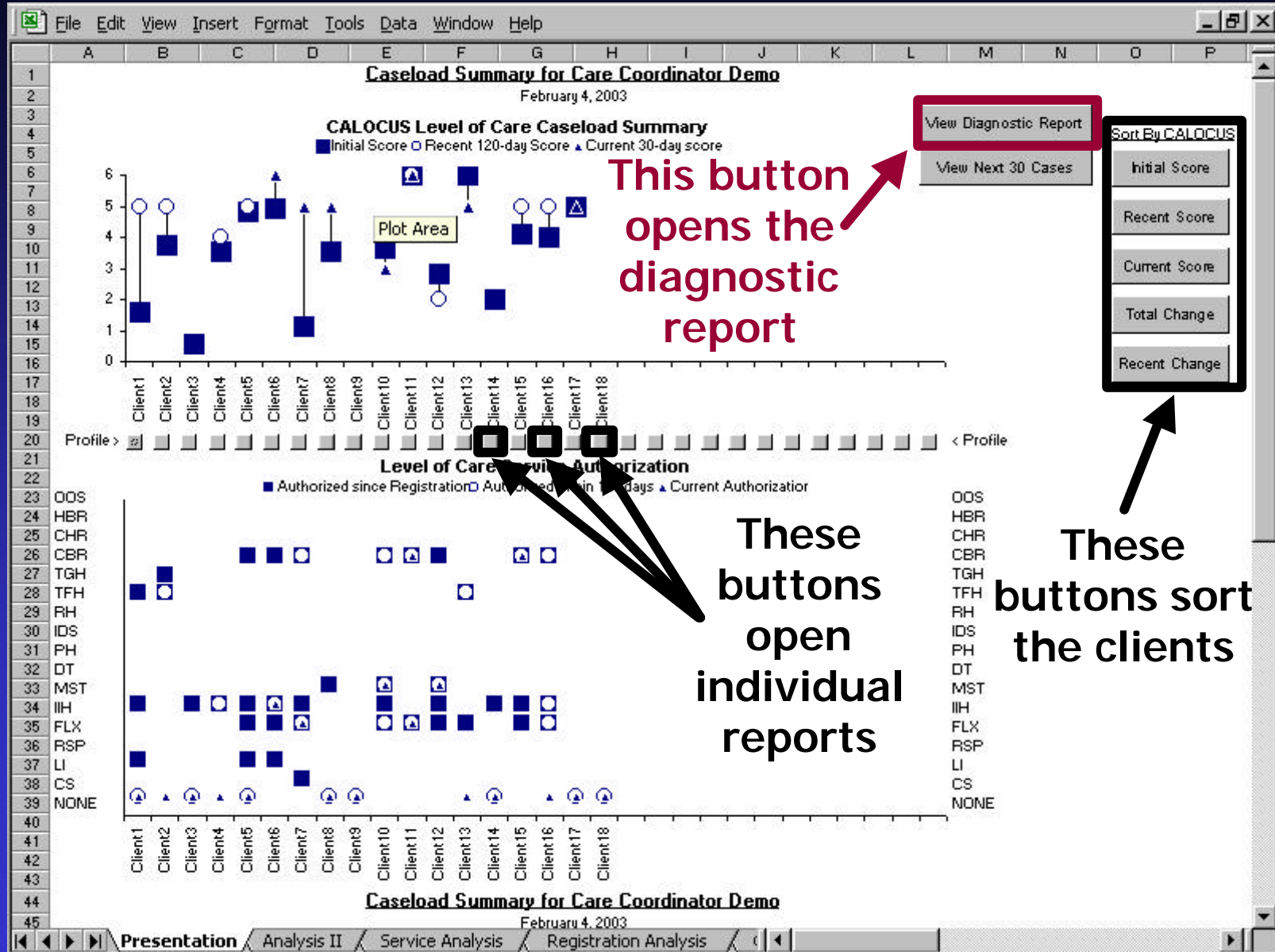
Caseload  
Report

Caseload Diagnostic  
Report

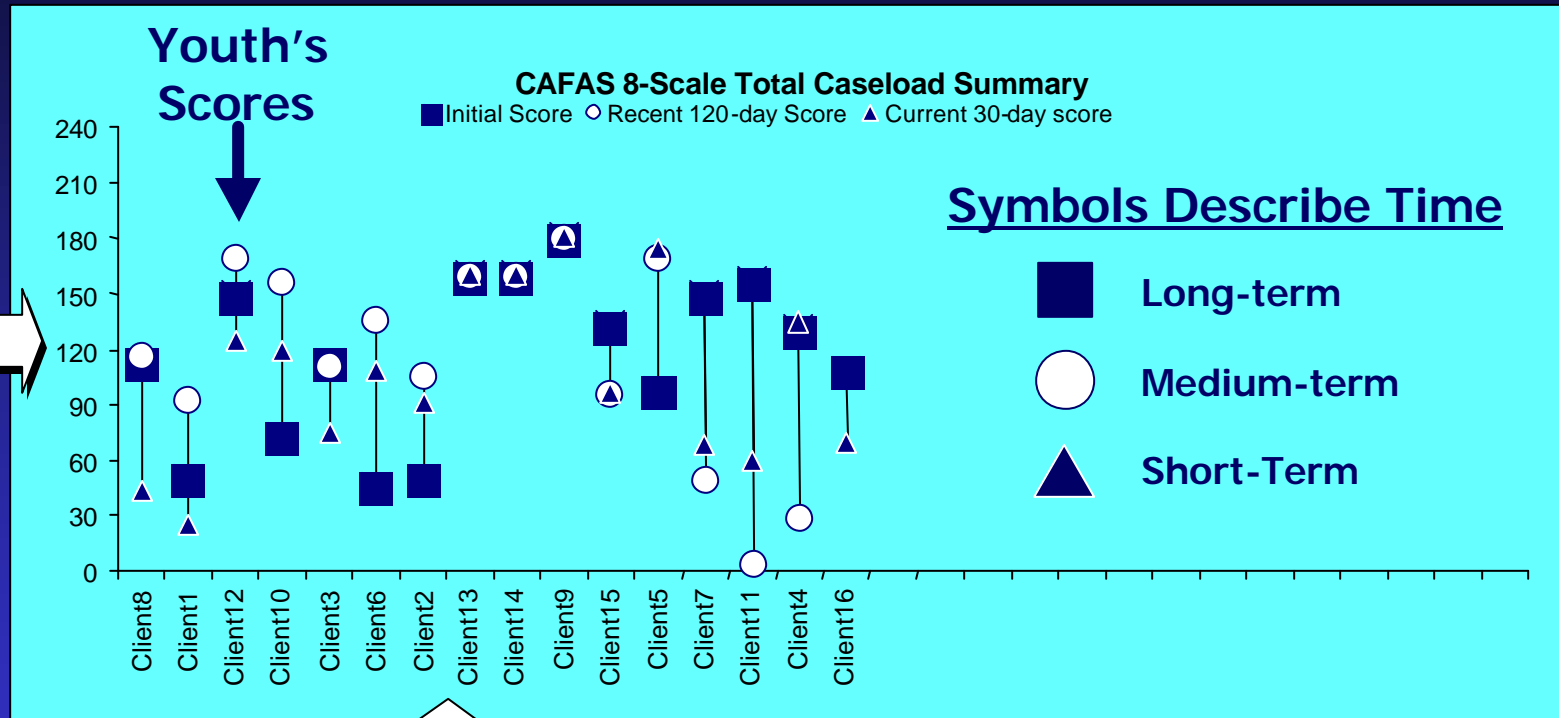
CALOCUS Level  
Service Authorizations  
CAFAS 8-Scale Total  
Interagency Involvement

CBCL Total Problems  
TRF Total Problems  
YSR Total Problems  
Diagnosis

# Welcome Back to Excel



# Caseload Graph Type 1



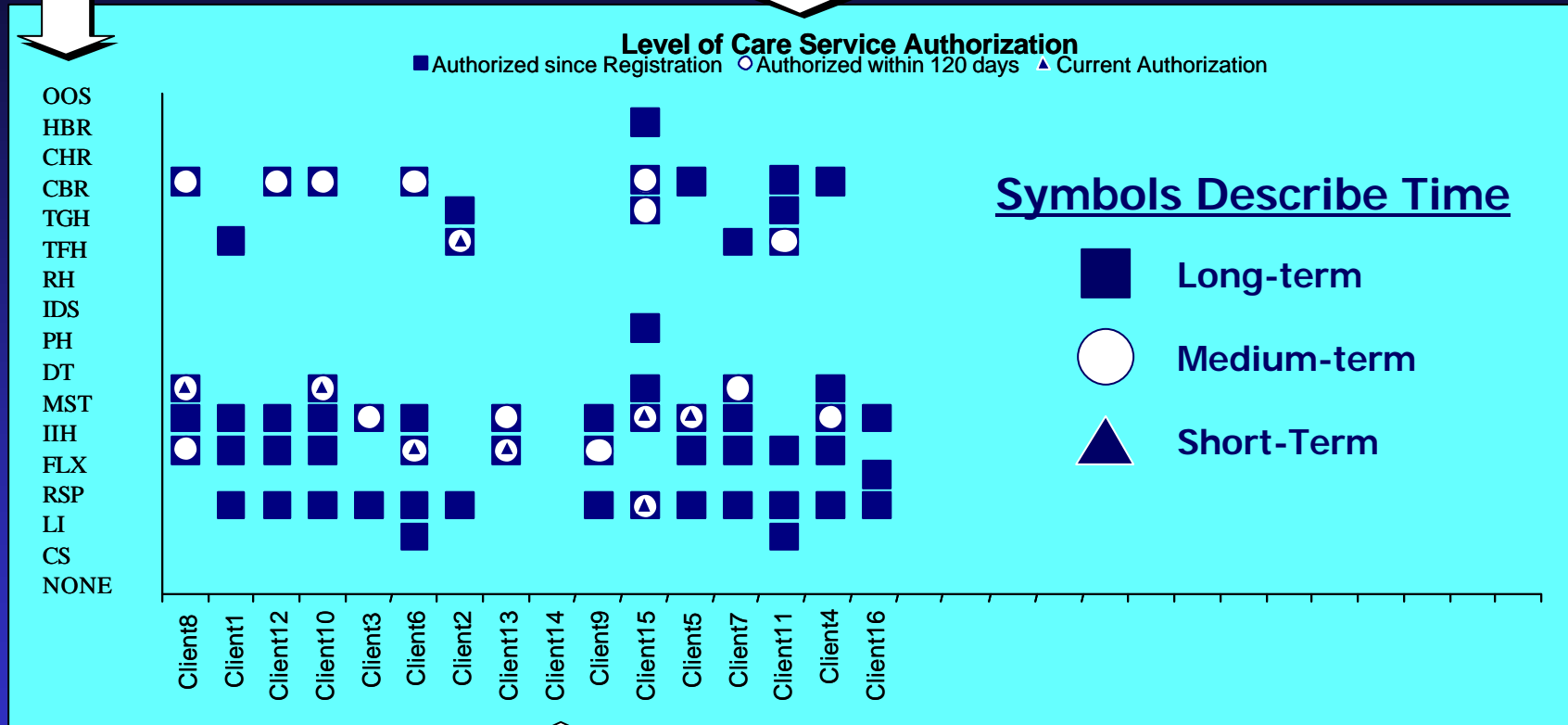
Scale  
Scores

Clients  
(CR Numbers)

# Caseload Graph Type 2

Response  
Categories

Response Dimension



Clients  
(CR Numbers)

# The Smooth and the Rough

Caseload Graphs present estimated data.

The numbers presented on the graphs may not be the actual scores obtained during measurements.

Where possible, the graphs use multiple measurements to calculate an estimate of a youth's score at a specific point in time.

Individual reports should be examined if you would like to see the actual scores at each assessment.

# Sorting Caseloads

Caseload Graphs may be sorted in several ways to make it easier to focus on specific aspects of the graph.

1. Initial Score (Squares)
2. Recent Score (Circles)
3. Current Score (Triangles)
4. Total Change (Initial Score to Current Score)
5. Recent Change (Recent Score to Current Score)



# Data Availability Timeline

The timeline for data availability will be the same in the clinical reporting module as it is for Discoverer reports:

Type of Information	Available
Registration Information	Next Day
Service Authorizations	Next Day
CALOCUS	Next Day
CAFAS	2 – 4 Working Days
Achenbach	7 – 10 Working Days

## Learning Objective #3

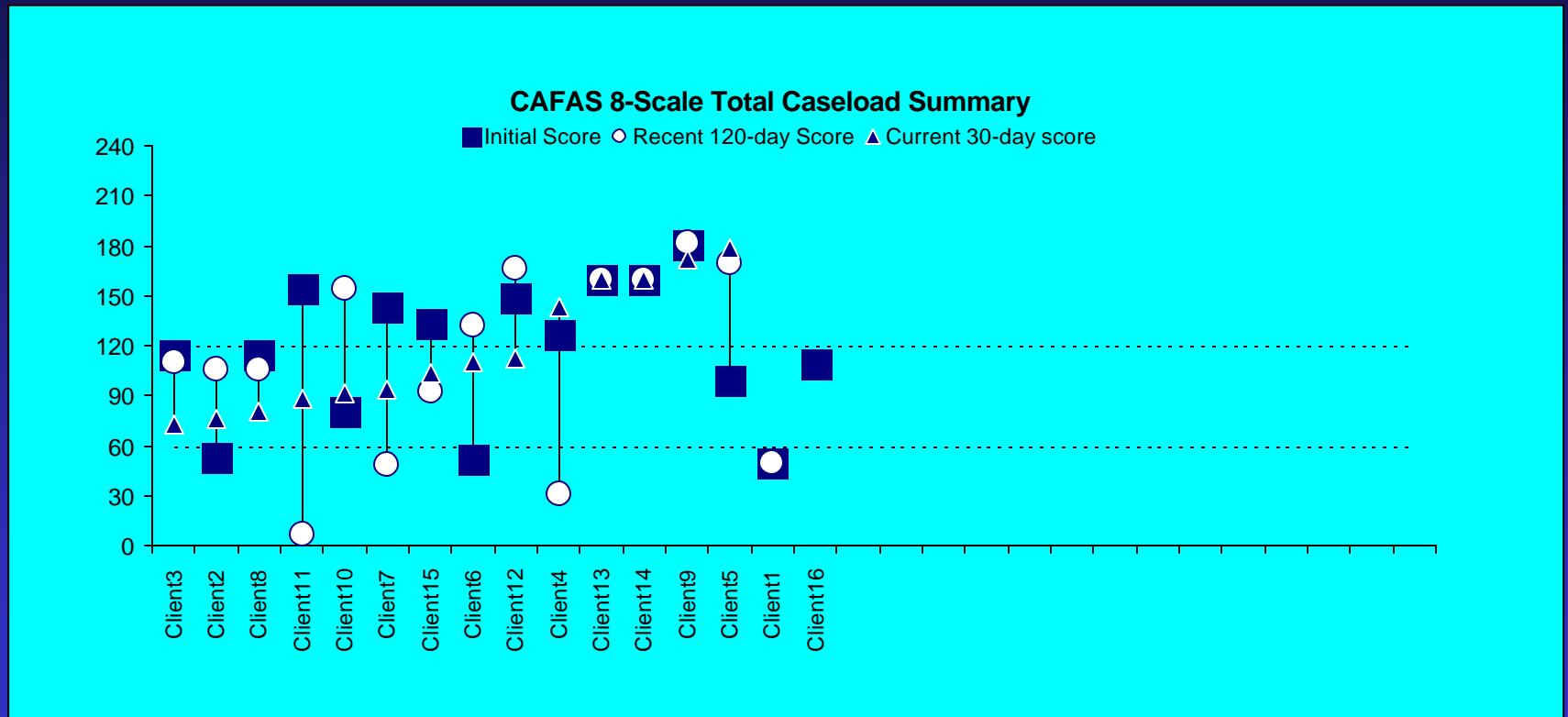
1. Learn to retrieve individual and caseload reports.
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# Four Common Staffing Questions

1. Which youth need outcome measure(s) completed in the next 30 days?
2. Which youth do not have current service authorizations?
3. Which youth have multiple service authorizations?
4. Which youth are involved with other agencies?

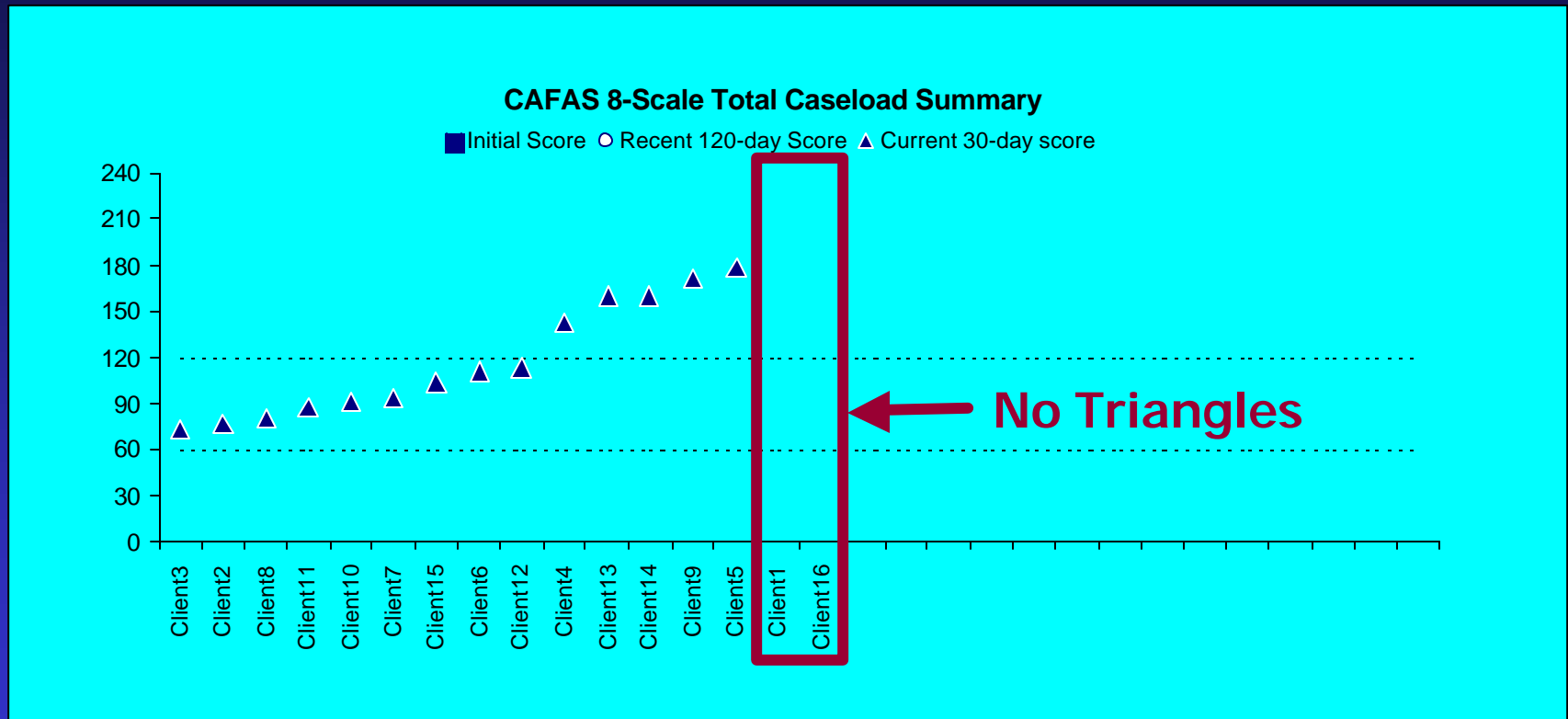
# Staffing Question #1

Which youth need outcome measure(s) completed in the next 30 days?



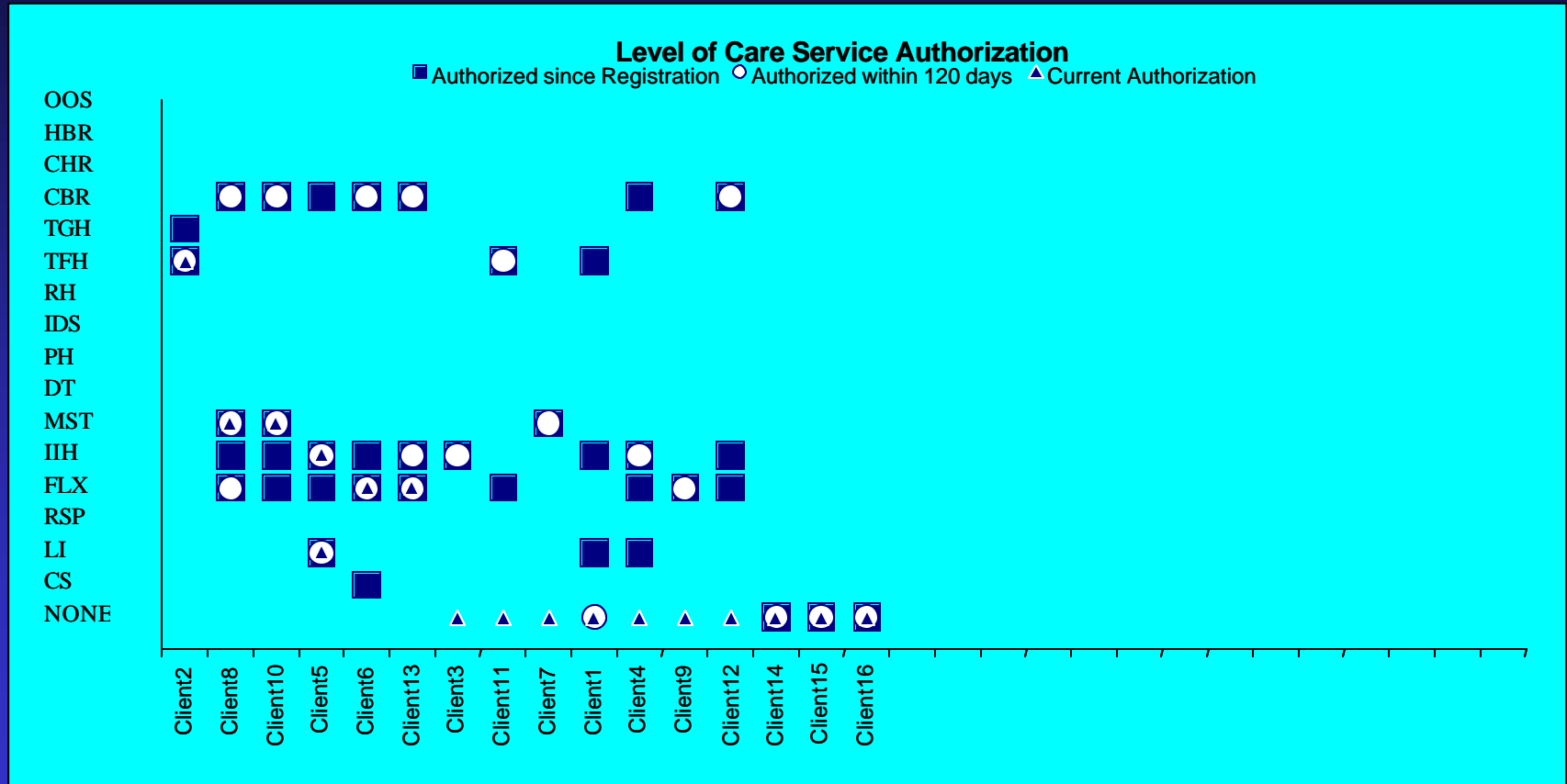
# Staffing Question #1

Which youth need outcome measure(s) completed in the next 30 days?



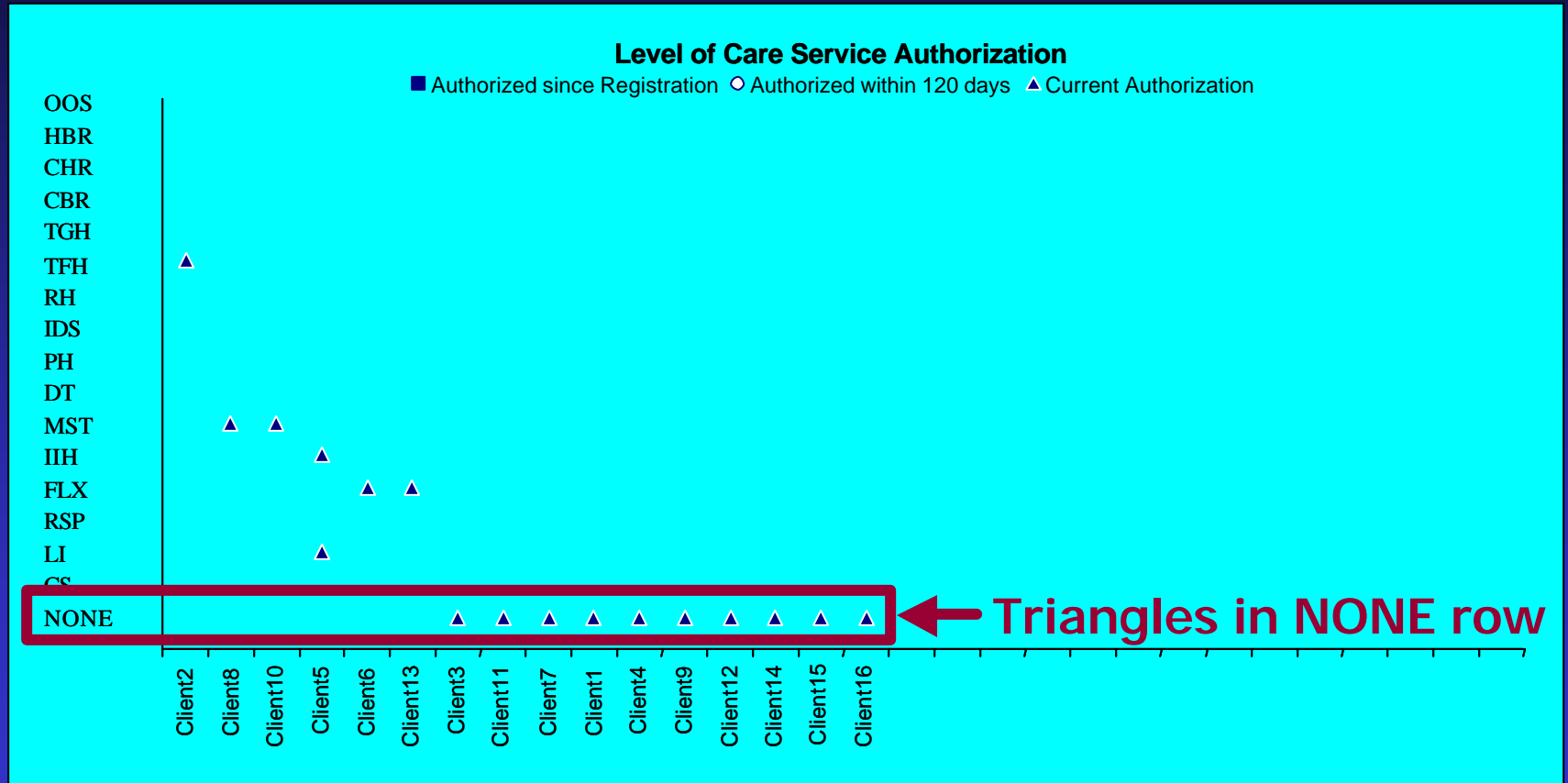
## Staffing Question #2

## Which youth do not have current service authorizations?



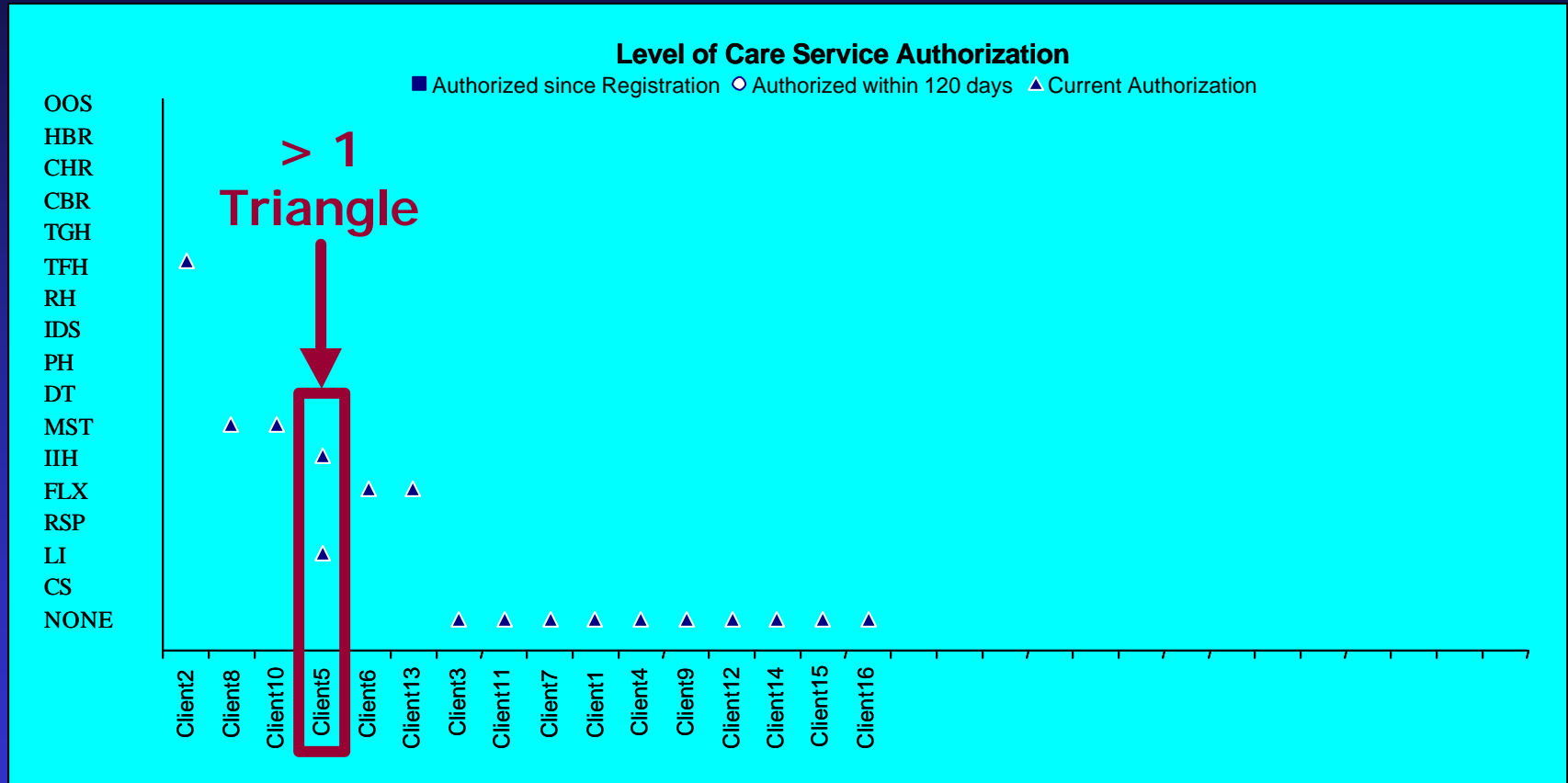
# Staffing Question #2

Which youth do not have current service authorizations?



# Staffing Question #3

Which youth have multiple service authorizations?







## Learning Objective #4

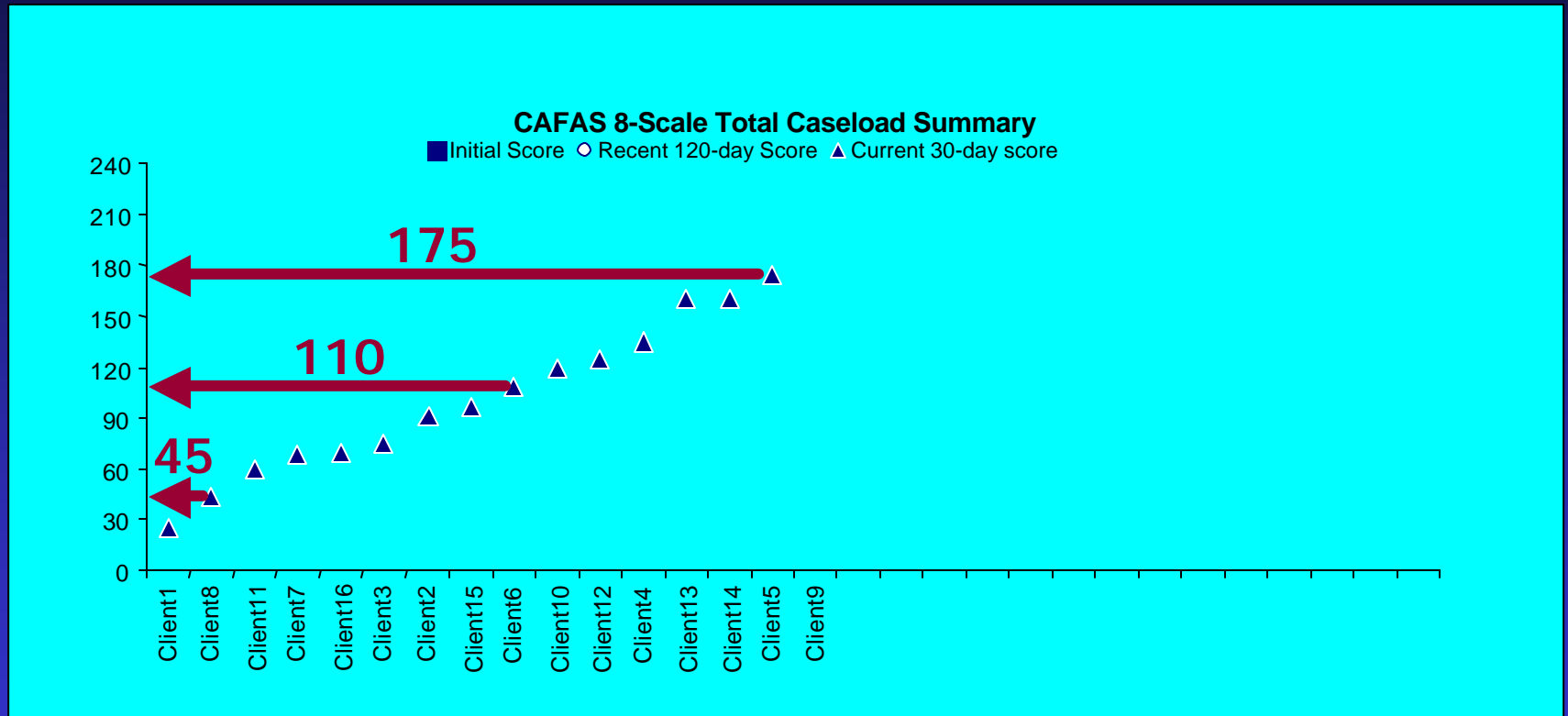
1. Learn to retrieve individual and caseload reports.
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# Six Common Clinical Questions

1. What is a youth's current level of functioning?
2. Is a youth's functioning improving or deteriorating?
3. How much has a youth's functioning changed?
4. What is the highest level of care that a youth is authorized to receive?
5. Has the youth's level of care changed?
6. Does the youth's level of functioning match the authorized level of care?

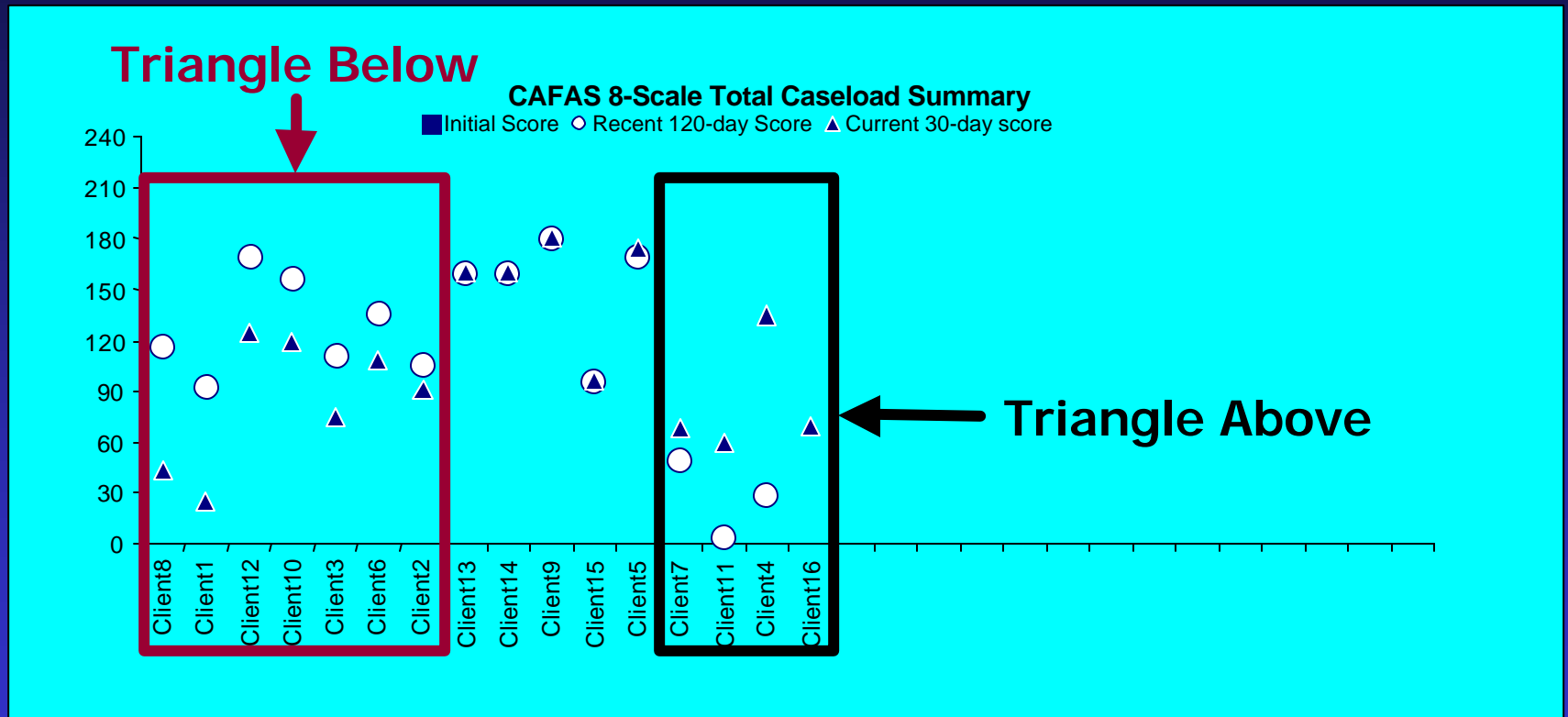
# Clinical Question #1

What is a youth's current level of functioning?



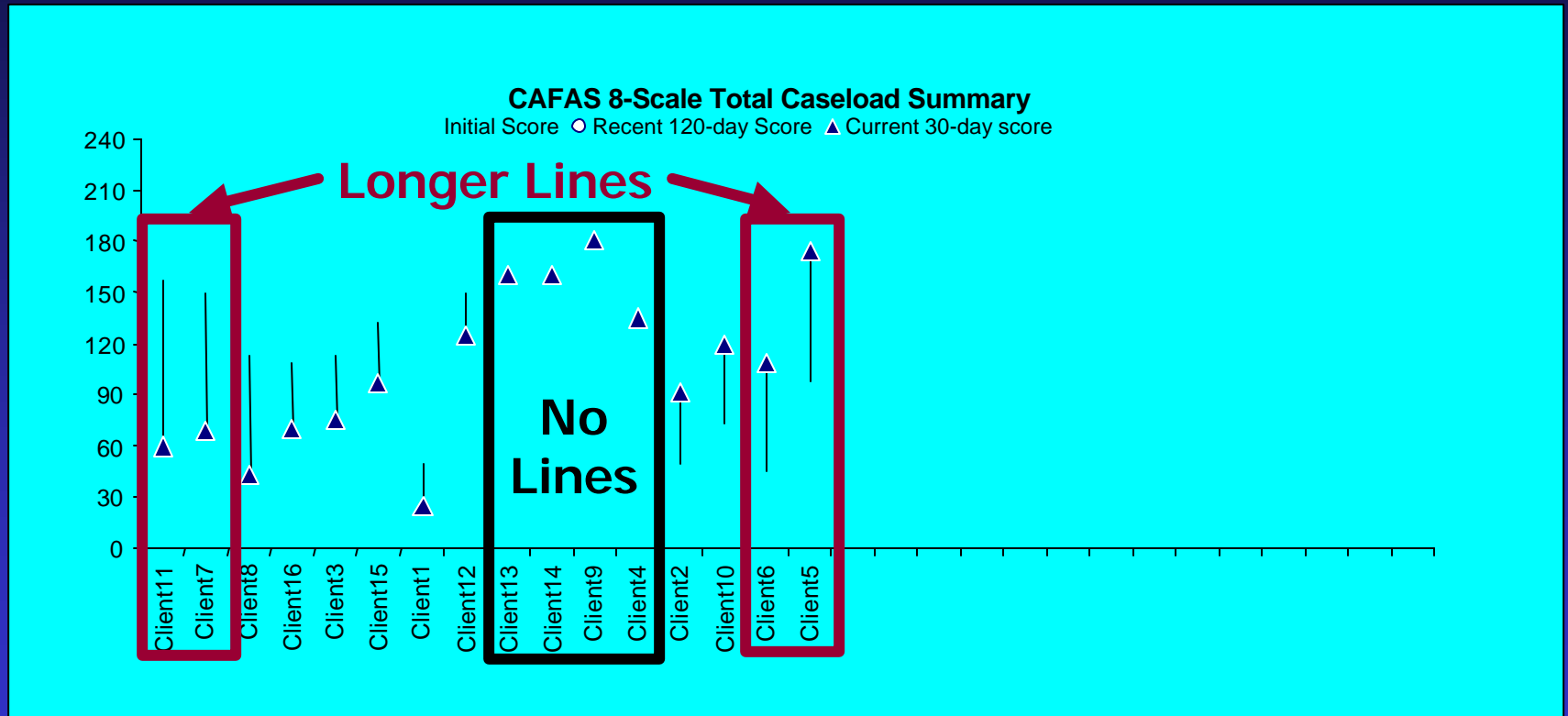
## Clinical Question #2

Is a youth's functioning improving or deteriorating?



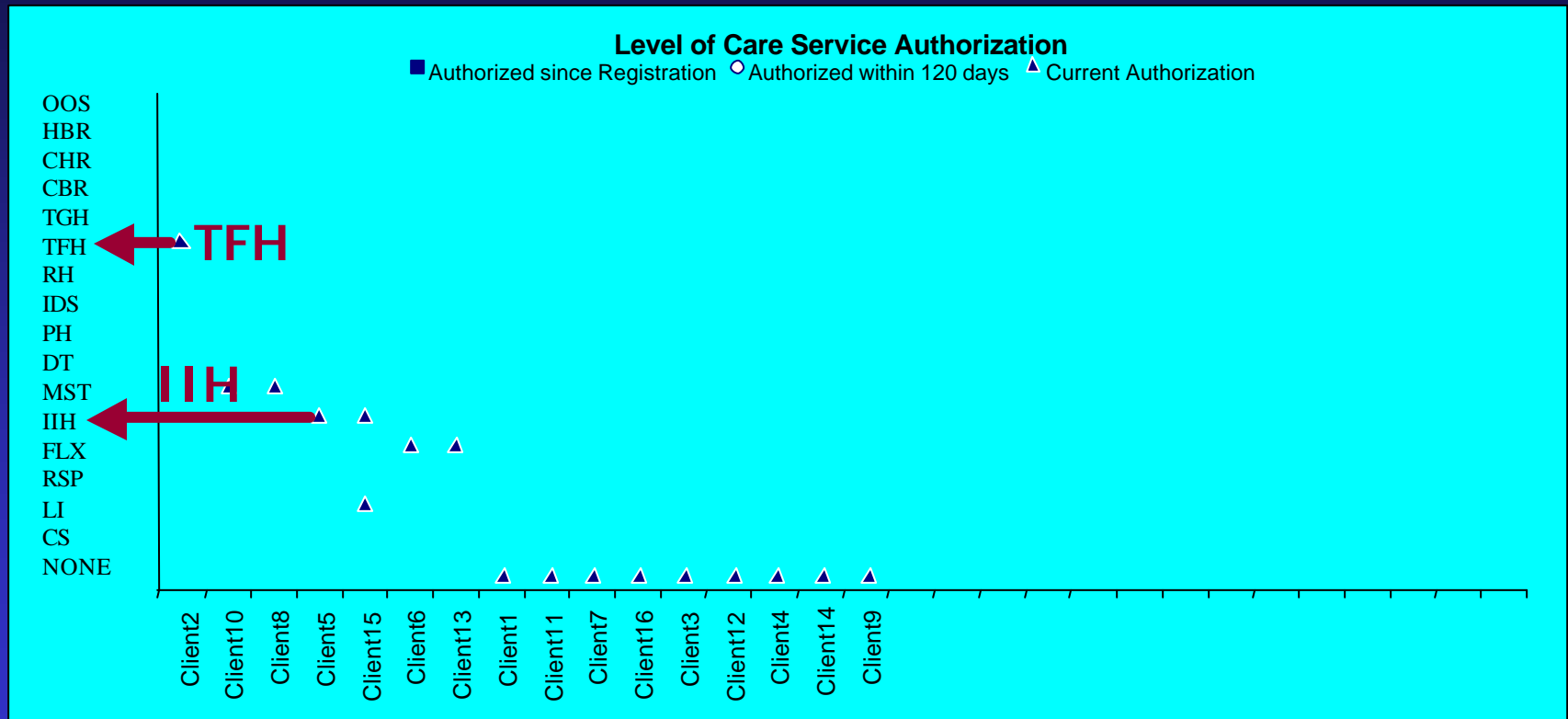
# Clinical Question #3

How much has a youth's functioning changed?



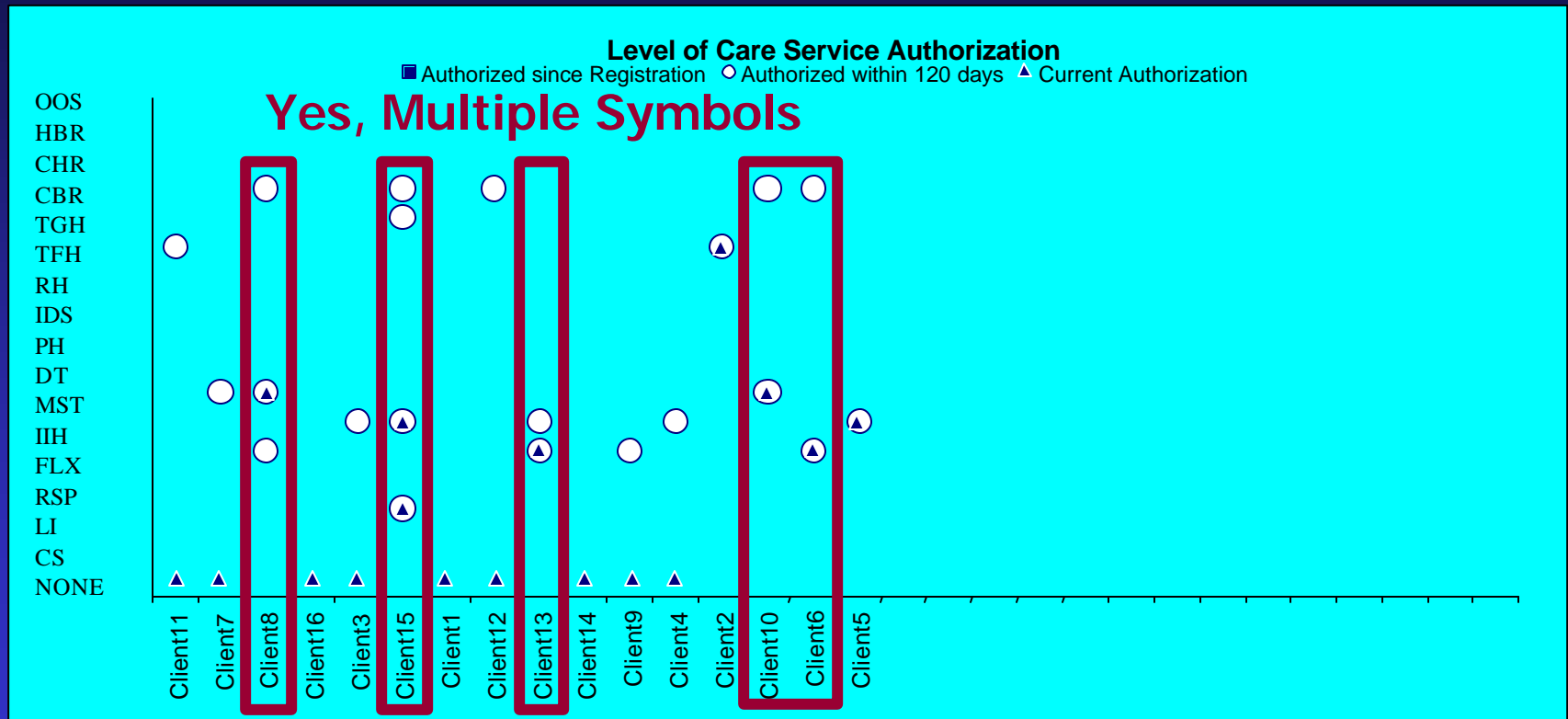
# Clinical Question #4

What is the highest level of care that a youth is authorized to receive?



# Clinical Question #5

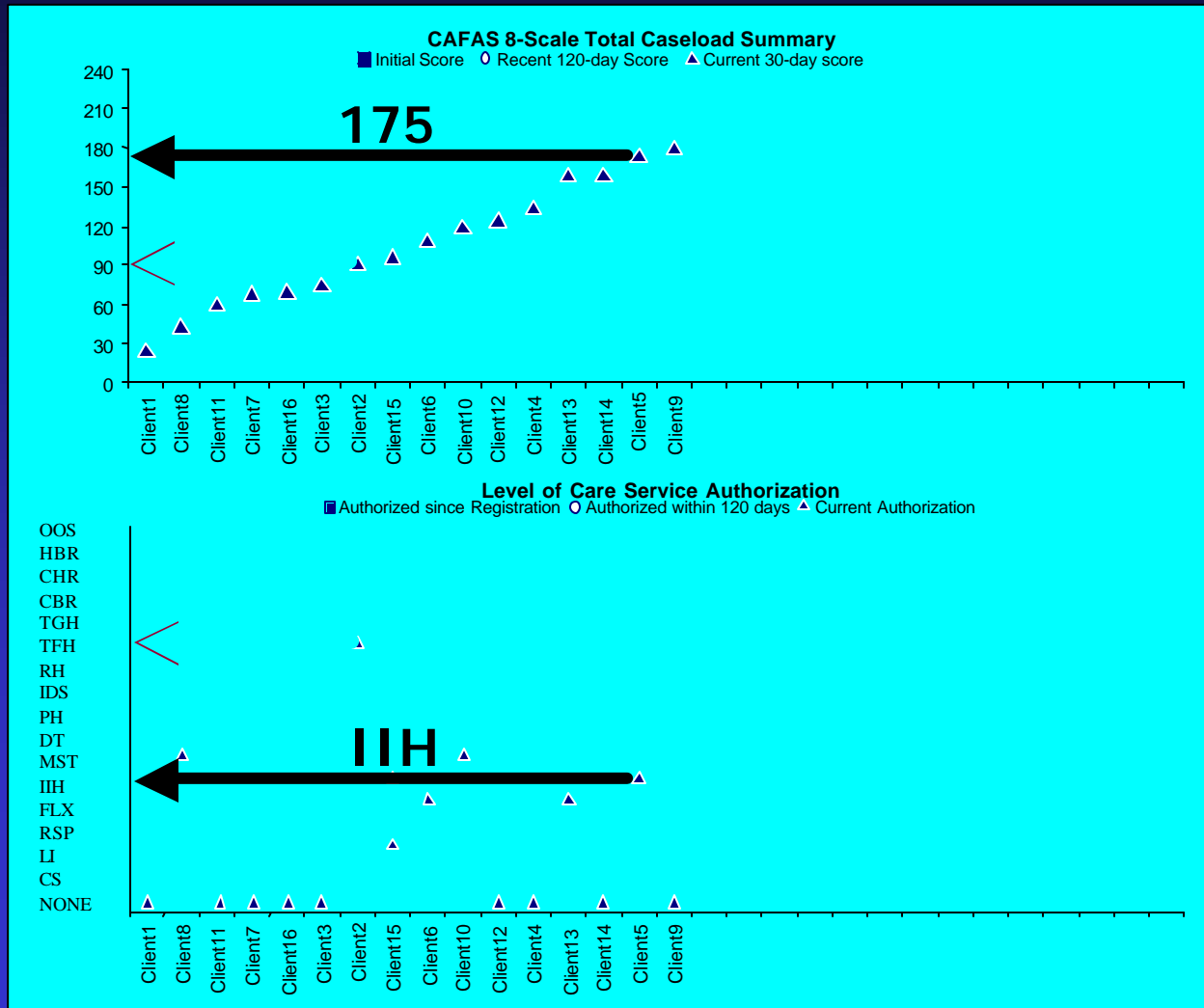
Has the youth's level of care changed?





# Clinical Question #6

Does the youth's level of functioning match the authorized level of care?



# Review: Learning Objectives

1. Learn to retrieve individual and caseload reports.
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# FGC Discussion Topics

1. Who will run and print the reports?
2. What is the procedure and timeline for requesting a report?
3. Who will bring the reports to meetings?
4. What questions will be asked at which meetings? By whom?
5. Will copies of individual reports be filed or shredded?
6. Who is responsible for filing or shredding reports?